

Training Module

Customer Service in Assisted Living

The module includes
Instructor Guide
Participant Manual
Pre-test & Post-test



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Customer Service in Assisted Living

Participant Manual

Overview of Customer Service in Assisted Living

How often do you hear people complaining about poor customer service? Probably more often than you hear them talking about good service. You know what good customer service looks like when you experience it. Think for a moment about your past experiences at the fast food drive through window. If you use the drive through, you undoubtedly have some customer service expectations. You want your order to be taken quickly. You hope the person taking your order is pleasant and charges you the correct amount. You want to get to the window to pick up your food quickly. You want the worker delivering your food to be pleasant and you hope he/she has acceptable personal hygiene. You probably expect the food in the sack to be hot, tasty, and exactly what you ordered. You drive off receiving exactly what you ordered in a timely manner. You would probably consider that good customer service.

Good customer service at a fast food drive through window is fairly easy to visualize. But what about good customer service in assisted living? You've probably never been a customer in assisted living, so you might have difficulty visualizing what good customer service would look like. You might envision that it looks something like good customer service in the nursing home—keeping fresh ice water at the bedside, making the bed in the morning, and making sure residents are turned, changed, and taken to the dining room at meal times.

The purpose of this module is to provide you with an understanding of the basic concepts of providing good customer service in assisted living. These principles were developed by organizations who simply asked seniors in assisted living programs what kinds of attitudes, goods and services they valued. After completing this module, you should have a better understanding of:

1. Who the customer is in assisted living
2. What quality of life means to assisted living tenants
3. How tenants and organizations who serve them measure quality of life
4. How programs can integrate customer service into their QA program
5. How organizations can create a customer service culture

Before we begin this module, if you don't mind, it would be great if you would take a quick test. It won't be graded. It's just designed to measure your current understanding of good customer service principles in assisted living. At the end of the module, you will take the same test again, but it won't be graded either. The post-test is designed to reinforce the key concepts of customer service. These concepts will be identified with a key graphic. Good luck on your test!

Customer Service in Assisted Living



Who is the customer in assisted living?

When you envision the typical customer in assisted living, you're probably thinking of an 85-year-old woman, who needs assistance with a couple of activities of daily living. If so, you're right—the average age of clients in Iowa assisted living programs is 85 years old. Seventy-five percent of clients are female, and 25 percent are male. The top four services accessed by tenants are bathing, dressing, medication management, and housekeeping.

This session will focus primarily on delivering stellar customer service to tenants, the traditional customers in assisted living. But it is important to understand that you have a wide variety of customers and potential customers that cross your doorstep every day. Can you name some of the people who interact with the staff and tenants in your program?

Delivering excellent customer service shouldn't be reserved just for tenants. It is important for all staff members to treat every individual who visits your program with respect and kindness. This person could be a link to your next admission, or they might become a valuable co-worker. Treating all visitors with respect creates a positive image for your program and positive "buzz" about the excellent service you provide.



What does quality of life mean to tenants?

The primary mission of assisted living is to promote independence and autonomy and to preserve and/or improve quality of life. In the fast food drive through example, we identified specific customer service elements that would need to be present to make our experience positive. In other words, we know, based on our own preferences, what signifies quality customer service. And so our mission then becomes to identify tenant preferences and elements that need to be present to create a positive customer service experience in assisted living.

Every tenant in your program is unique. Some lived on farms. Some lived in town. Some women worked outside the home to help support their family financially. Some were housewives who worked beside their husbands on a farm. Some men were farmers, some spent their life in a factory, and some ran a successful small business. For some tenants, quality of life means staying active, busy, and productive. Some tenants may have worked hard all of their lives, and they value the opportunities for rest and relaxation during the

retirement years. Some may enjoy opportunities to socialize, and some may prefer to entertain themselves.

Now that we've determined every client is unique, how in the world can we go about designing a customer service culture with all the diverse backgrounds, attitudes, and preferences? Luckily we have a good pattern from which to build our program.

There are some key concepts that determine tenant satisfaction in assisted living. We will spend a significant amount of time discussing each of these tenant perspectives on quality:

**Safety
Security
Access
Comfort & Convenience
Dignity**

Safety and Security: Frailty, physical disability, mobility issues, and the general loss of physical strength and flexibility that comes with the aging process can create feelings of vulnerability in seniors. Tenants who lived on a farm may report that they never locked the doors in their home, but they now lock their apartment door religiously. Tenants may advise that the keypad entry on your front door gives them a sense of safety and security. What other kinds of features and services would create a sense of safety and security in your assisted living program?

Access & Convenience: Increasing frailty also brings about new challenges and struggles for tenants in your program. Mobility issues, chronic pain, and loss of strength and flexibility can create a situation where things that once seemed to be within easy reach now just as well be miles away. Access to personal care supplies, health care professionals, and people who are important in the tenant's life are critical in preserving quality of life. What can your assisted living program do to help tenants access critical goods, services and relationships? Can you think of an instance where you could make an activity more convenient for one of your tenants?

Comfort: Are you the person in the room who wears a coat when everyone else is in short sleeves? Or are you the person who is opening the windows for "fresh air" while everyone else shivers and shakes? And how do you feel after you've worked a day in uncomfortable underwear? We take for granted that, when we are in an uncomfortable situation, we can simply make the changes necessary to restore a sense of comfort. But what if, because of lack of resources, health, mobility, or information we were forced to work every day in uncomfortable underwear? Would we be seeing quality everywhere we looked? We would

probably become quite irritable and discontent in a very short period of time. Our tenants many times lack the resources, information, and sometimes the communication skills to make changes that will increase comfort. What are some issues we might address to ensure every resident has a high level of comfort?

Dignity: Have you ever walked out of a public restroom and had a stranger approach you to tell you that the back of your skirt was tucked up in your underwear? Or maybe you've participated in a scene where your child throws a temper tantrum in the grocery store, while strangers looked on disapprovingly. Have you ever given birth to a child while a group of six or eight interns views the spectacle from the foot of your bed? Every one of us, at one time or another, has found themselves in an undignified position or situation. The effects of disease and disability create many opportunities for seniors to find themselves in situations where their dignity is compromised or violated.

We know what a violation of dignity looks like, but how can we make a conscious effort to preserve dignity? Upholding the dignity of an individual will require some attention to these key concepts:

**Autonomy
Privacy
Individuality
Recognition
Meaningful Activity
Spiritual Well-Being
Functional Competence
Value**

Let's spend a little time talking about how we can create a customer service culture that preserves dignity by addressing these key concepts.



How can we measure quality of life?

There are eight key areas of your assisted living programs that tenants will use to measure your success in creating an environment that focuses on quality of life:

**Staff
Meals and Dining Arrangements
Management
Relationships
Facility Structure
Resident Rights
Living Needs
Assistance in Transition**

Let's spend some time talking about what we would need to do in each of these areas to ensure quality service.



How can we integrate customer service into our quality assurance program?

In order to build a customer-focused program, organizations must be willing to gather input from a variety of sources. You can't develop an effective quality assurance program without identifying issues that are important to your tenants. The following tools can be valuable in gathering both baseline and ongoing data to develop and refine your quality assurance plan.

Satisfaction Surveys

There is no better way to find out if customers are truly satisfied with your customer service than to simply ask them. Customer satisfaction surveys are the best way to measure customer satisfaction. Surveys should be anonymous and should be offered to both tenants and family members. Many times family members have a different perspective than tenants, and their input can be invaluable in your efforts to hone your customer service skills.

In addition to customer satisfaction surveys, organizations who are truly interested in raising the quality bar are wise to conduct employee satisfaction surveys. Satisfied, committed, loyal employees are the first and most important ingredient in any recipe to create a customer service culture. Employees should receive performance reviews at least annually, and they should be allowed to provide feedback regarding their supervisor's leadership skills.

Tenant, Family, and Food Councils

Councils are an invaluable tool in creating a climate where feedback is both welcomed and encouraged. Giving tenants and family members the opportunity to participate in council meetings, where they can discuss important issues and air concerns in a respectful and constructive manner in public is a great way to showcase your program's interest in serving customers. Follow-up is critical. When issues are identified, responsibility for research and/or action should be assigned, and progress should be reported at the next meeting.

It will come as no surprise that the majority of complaints in assisted living often times center around the food. No matter how fantastic your cook is or how much money you spend on raw food, you simply can't please all the people all the time. Food councils are a great tool to help tenants see what you are "up against" when it comes to delivering a menu that suits everyone. One resident may speak up and say, "We have too much pasta," and the next resident will say, "I don't think we have enough pasta." It's a perfect opportunity to reinforce that you do the very best you can to accommodate the tastes and preferences of all tenants.

If you imagine eating at the same restaurant three times every day, you will begin to understand how tenants may grow discontent with the menu, even though you feel you are offering a good variety. Consider allowing them to recommend special meal ideas, such as Mexican or Chinese food or salad bars, pizza night, or maybe an occasional fast food lunch, where staff members take orders and run out to pick up lunch.

Tip: Holding a separate food council lets you focus on other issues during tenant council. Otherwise, the entire time allotment for tenant council will be consumed with food issues. Although tenant councils should be held every month, holding food councils every other month is usually acceptable to tenants.

Hold family councils at least twice a year. Offering snacks or a meal will increase attendance. Publish an agenda in advance so that tenants and family members can be collecting their thoughts. Allow a period of time at the end for new business, at which time families can bring specific issues to the table. Be prepared to provide a progress report in regard to issues that were raised at the previous family council meeting. Failure to follow-up on identified issues will undermine efforts to convince tenants and family members that your organization is committed to providing stellar customer service.

Complaint process: Create a suggestion box or some other formal method for tenants and family members to provide feedback on a regular basis. Keep a written record of complaints and follow-up until the complaint is resolved. Reviewing this written documentation from time to time can help to identify systemic issues that may need to be addressed through the program's quality assurance program.



What does a customer service culture look like?

In a customer service culture, you will find the following:

- **Staff who have an intimate knowledge of who the customer is and what brings them joy, fulfillment, comfort and satisfaction**
- **Committed, caring staff members with a high level of job satisfaction**
- **Management staff who understand the importance of effective conflict resolution and who are available to address issues as they arise**
- **A recognition that it costs six times more to attract a new customer than to keep an old one**

- **An evaluation system that includes teamwork and customer service as critical employee performance components**
- **An on-going education and training program**
- **Staff who are empowered to say “yes” to the customer whenever possible**
- **Approval to say “I don’t know” and connect the customer with someone who does**
- **A unified customer focus**
- **A quality plan that includes quality measures and plans for improvement**

Please take just a few moments to see if you can rank the reasons why clients leave assisted living, with 1 being the most frequent reason, and 6 being the least frequent. When you are finished, the instructor will provide you with the correct answers.

Why do customers leave assisted living?

Rank of Importance	Reasons They Leave
	Friend’s recommendation
	Price
	Move
	Death
	Perception of non-caring
	Product dissatisfaction

Summary:

Developing a stellar customer service culture in assisted living presents both unique challenges and incredible rewards. It's going to take some time and effort to get to know clients so well that you can predict what they want before they even know themselves. But what a great opportunity to serve those who are in need of our help.

When it comes to creating a customer service culture in assisted living, knowing the customer is the first step. Your program will want to design a strategy to get to better know the clients and then to design opportunities to exceed each tenant's expectations. In a nutshell, that's what a customer service culture is—getting to know the customers so well that you are delighting them every time they turn around.

You are at the center of your program's efforts to create that kind of culture. You have the power to positively influence your program's quality customer service efforts. Use your powers for good!!!

Now, let's take the test again (using the post-test column) and see if there are any areas of improved understanding.

Customer Service in Assisted Living

Instructor Manual

Notes for instructor:

Before beginning the session, make a copy of the participant's manual for each attendee, along with a copy of the test found at the end of this module. The test serves as both a pre-test and post-test, so that participants can see at a glance their improved understanding of customer service in assisted living after completing the module. Answers for the tests are provided on the answer key.

The instructor's manual contains the exact text that is contained in the participant's guide, with notes to spark discussion at certain intervals (notes to the instructor will be given in the font you are reading now). Having staff read sections aloud, rather than reading it to them, will keep people more engaged in the module. Ask for volunteers, so as not to embarrass staff members who might be uncomfortable reading aloud.

Before beginning the session, explain to the attendees that you are going to ask them to introduce themselves, and after they do, you are going to ask them a question. Advise them if the question touches a nerve or makes them uncomfortable in any way, they should simply say, "Pass," and you will move on to the next question. Highlight some questions from the list below, and ask participants to give an answer that is 30 seconds or less.

The purpose of this exercise is to serve as an ice breaker, but more importantly to show participants how much you can learn about a person by asking one simple question. Giving people a chance to voice their feelings, thoughts and past experiences helps you to have a better understanding of who they are and what is important to them.

1. What was the happiest day of your life?
2. What is your most vivid memory of a grandparent?
3. What is your favorite smell from childhood?
4. Have you ever lost someone serving in the military?
5. What is the funniest thing you've ever heard?
6. What's the best roller coaster you've ever ridden?
7. How would you describe your relationship with your siblings?
8. What is your favorite food?
9. What is your happiest high school memory?
10. How do you handle illness?
11. How old were you the first time you got drunk?
12. Who is the most quirky person in your family?

13. How long have you had your best friend?
14. What is your happiest junior high memory?
15. How has your life turned out differently than you might have thought?
16. What do you do when someone is treating a store clerk badly?
17. What is your favorite elementary school memory?
18. What is your first instinct when someone verbally attacks you out of the blue?
19. What is the quickest way to make you mad?
20. What is your most vivid summer memory from childhood?
21. What quality do you find least desirable in a roommate?
19. When you are upset, how do you comfort yourself?
20. What quality do you find most desirable in a roommate?
21. What food always sounds good when you're sick?
22. What is the funniest thing you've ever seen?
23. What single issue do you feel is most important in our society today?
24. On a scale from one to ten (ten being the highest), how would you rate your pain tolerance?
25. What is your best feature?
26. Have you ever been involved in a physical altercation that didn't involve a sibling?
27. How do you feel about a military draft?
28. What's the very first thing you do when you get up in the morning?
29. What sense would you hate to lose most?
30. What is your favorite color?
31. When you were little, and people asked you what you wanted to be when you grew up, what did you say?
32. Did you ever sock it to a sibling growing up?
33. If money was not an issue, and you had your choice of any job in the world, what would it be?
34. Do you think you make enough money?
35. What's the best book you've ever read?
36. What's the best movie you've ever seen?
37. Who was your best friend when you were 13?
38. What's the best pet you've ever had?
39. Where did you go on the best vacation you've ever taken?

Instructor: Talk about specific, interesting things you learned through this exercise and reinforce the concept that you can only provide stellar customer service if you have a great understanding of who the client is and what is important to him/her.

Overview of Customer Service in Assisted Living

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Instructor: Allow about five minutes for participants to complete the pre-test. Do not collect them—leave them with each employee.

Customer Service in Assisted Living



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This session will focus primarily on delivering stellar customer service to tenants, the traditional customers in assisted living. But it is important to understand that you have a wide variety of customers and potential customers that cross your doorstep every day. Can you name some of the people who interact with the staff and tenants in your program?

Delivering excellent customer service shouldn't be reserved just for tenants. It is important for all staff members to treat every individual who visits your program with respect and kindness. This person could be a link to your next admission, or they might become a valuable co-worker. Treating all visitors with respect creates a positive image for your program and positive "buzz" about the excellent service you provide.

Instructor: Ask employees to identify some non-traditional customers. These might include vendors, family members, church groups, volunteers, groups who provide activities, the mail delivery person, the person who fills the pop machine, etc. The vendor who stops by to sell light bulbs might be looking for a new career and may turn out to be your next great employee.



What does quality of life mean to tenants?

The primary mission of assisted living is to promote independence and autonomy and to preserve and/or improve quality of life. In the fast food drive through example, we identified specific customer service elements that would need to be present to make our experience positive. In other words, we know, based on our own preferences, what signifies quality customer service. And so our mission then becomes to identify tenant preferences and elements that need to be present to create a positive customer service experience in assisted living.

Every tenant in your program is unique. Some lived on farms. Some lived in town. Some women worked outside the home to help support their family financially. Some were housewives who worked beside their husbands on a farm. Some men were farmers, some spent their life in a factory, and some ran a successful small business. For some tenants, quality of life means staying active, busy, and productive. Some tenants may have worked hard all of their lives, and they value the opportunities for rest and relaxation during the retirement years. Some may enjoy opportunities to socialize, and some may prefer to entertain themselves.

Now that we've determined every client is unique, how in the world can we go about designing a customer service culture with all the diverse backgrounds, attitudes, and preferences? Luckily we have a good pattern from which to build our program.

There are some key concepts that determine tenant satisfaction in assisted living. We will spend a significant amount of time discussing each of these tenant perspectives on quality:

**Safety
Security
Access
Comfort & Convenience
Dignity**

Instructor: Take time to discuss the question at the end of each paragraph.

Safety and Security: Frailty, physical disability, mobility issues, and the general loss of physical strength and flexibility that comes with the aging process can create feelings of vulnerability in seniors. Tenants who lived on a farm may report that they never locked the doors in their home, but they now lock their apartment door religiously. Tenants may advise that the keypad entry on your front door gives them a sense of safety and security. **What other kinds of features and services would create a sense of safety and security in your assisted living program?**

Participants may identify some of the following as increasing safety and security: Grab bars in showers; handrails in hallways; controlled entrance to the building (i.e., receptionist or key pad entrance); fire alarms and sprinkler systems; and 24-hour staffing.

Access & Convenience: Increasing frailty also brings about new challenges and struggles for tenants in your program. Mobility issues, chronic pain, and loss of strength and flexibility can create a situation where things that once seemed to

be within easy reach now just as well be miles away. Access to personal care supplies, health care professionals, and people who are important in the tenant's life are critical in preserving quality of life. **What can your assisted living program do to help tenants access critical goods, services and relationships? Can you think of an instance where you could make an activity more convenient for tenants?**

Instructor: Suggestions for improving access might include arranging transportation, selling paper products to tenants at cost, inviting a podiatrist to conduct clinic on-site, creating family friendly policies, and hosting family events. Suggestions for making an activity more convenient for tenants might include renting a lift van to view holiday lights or using a microphone to call bingo numbers for the benefit of residents with hearing impairment.

Comfort: Are you the person in the room who wears a coat when everyone else is in short sleeves? Or are you the person who is opening the windows for "fresh air" while everyone else shivers and shakes? And how do you feel after you've worked a day in uncomfortable underwear? We take for granted that, when we are in an uncomfortable situation, we can simply make the changes necessary to restore a sense of comfort. But what if, because of lack of resources, health, mobility, or information we were forced to work every day in uncomfortable underwear? Would we be seeing quality everywhere we looked? We would probably become quite irritable and discontent in a very short period of time. Our tenants many times lack the resources, information, and sometimes the communication skills to make changes that will increase comfort. **What are some issues we might address to ensure every resident has a high level of comfort?**

Instructor: Suggestions might include climate control (i.e., separate heating and cooling in each room), ensuring that dining room chairs are comfortable, helping residents procure a needed lift chair, adding stool risers in restrooms, and providing a special meal or treat for residents who are ill.

Dignity: Have you ever walked out of a public restroom and had a stranger approach you to tell you that the back of your skirt was tucked up in your underwear? Or maybe you've participated in a scene where your child throws a temper tantrum in the grocery store, while strangers looked on disapprovingly. Have you ever given birth to a child while a group of six or eight interns views the spectacle from the foot of your bed? Every one of us, at one time or another, has found themselves in an undignified position or situation. The effects of disease and disability create many opportunities for seniors to find themselves in situations where their dignity is compromised or violated. **Can you share with the group a brief example of how/when your dignity was violated?**

Instructor: Allow time for at least a few participants to talk about a time when they felt their dignity was violated. Focus on how the situation could have been handled in a manner that preserved dignity.

We know what a violation of dignity looks like, but how can we make a conscious effort to preserve dignity? Upholding the dignity of an individual will require some attention to these key concepts:

Autonomy
Privacy
Individuality
Recognition
Meaningful Activity
Spiritual Well-Being
Functional Competence
Value

Let's spend a little time talking about how we can create a customer service culture that preserves dignity by addressing these key concepts.

Autonomy: The right to govern oneself. If caregivers wake residents up at 6 a.m. for a bath because it is convenient for the staff, does that support the concept of autonomy? Ask participants to talk about things that are important to them every day (i.e., like to have a cup of coffee first thing in the morning, like to watch a soap opera every day at 2 p.m., etc.). If staff pressure tenants to adhere to the schedule set by the program, they are not supporting the concept of autonomy.

Privacy: Care is delivered behind closed doors, and visitors can be entertained behind closed doors. Staff members assist with bathing as prescribed by the tenant. For instance, if a tenant is modest and does not want to be seen naked, staff should not try to convince the client otherwise, but using such phrases as, "Oh, you don't have anything I haven't seen before," or "I've seen hundreds of naked people," etc. It is essential that staff knock on the tenant's door and wait until they are invited to enter. You would not enter a person's home in the community without knocking, and the tenant's apartment is their home.

Individuality: Every tenant brings to the program their own idiosyncrasies, life experiences, emotional "baggage," and value system. Staff should embrace the uniqueness of tenants and identify what is most important to each tenant when it comes to providing care.

Recognition: An employee who loves ballet and hates hockey would not feel appropriately rewarded if given tickets to a hockey game by his/her supervisor. Managers who know employees well know what is important to them and what type of recognition and/or reward would delight the employee. Likewise, recognition of residents should be based on a deep understanding of the individual. Birthday celebrations are a perfect example of the differences between individual tenants. Some will want to be the center of attention and would be thrilled if you threw a big party in their honor. Tenants who are less sociable may be mortified to have that sort of attention lavished upon them. Knowing the customer allows you to choose the appropriate form of recognition.

Meaningful activity: All AL programs are required to assess the leisure interests of clients prior to admission. If a client indicates he/she has been involved in needlecrafts for more than 60 years, we can assume that the client sees those as meaningful activities. If the client indicated they do not want to play bingo, but that is the primary activity in your program, your activities will hold little meaning for that individual. Consider allowing the tenant to spearhead the organization of a quilter's club or set aside some time to show the other tenants their needlework and answer questions. Again, knowing the customers is the only way to structure an activity program that is meaningful to each individual.

Spiritual well-being: Clients who come from home may have attended worship services all of their lives. Maybe a neighbor came to pick them up when they could no longer drive. The client did not have the nerve to ask the neighbor to drive all the way across town to pick her up, so she simply assumes her church-going days are over. What if there is a neighbor to your AL program that attends the same church? Could you help the tenant find another ride so she could continue to engage in an activity that has brought joy and comfort to her all of her life? Don't assume that tenants will be satisfied with having a guest pastor come in once a week or once a month. Spiritual beliefs are very personal, and we need to determine what a rich and rewarding spiritual life looks like to each client.

Functional competence: Maybe you have a tenant who was an avid reader, but can no longer enjoy that activity because of vision problems. Could your public library help you procure reading materials in large print? Maybe one of your tenants can no longer put on her socks and shoes. Could your local PT and OT work with you and the tenant to find solutions to keep the tenant more independent? It is important for the program not to assume that

increasing frailty means decreased functional competence. New assistive devices are invented every day that can help seniors maintain functional competence. A telephone with large numbers for fingers that don't work as well as they used to or voice amplification to assist those who can no longer speak as loudly as they once did is but one example of an assistive device that can help to preserve functional competence.

Value: No matter how old we get, we all want to feel like we have something to contribute. Maybe one of your tenants is valued by her family and community for the beautiful quilts she makes. Maybe you have a tenant who is still actively involved in her church choir, and she feels valued for her contribution. Maybe you have a retired school teacher who would love to help tutor young students, if she were given the opportunity. Seniors can often struggle with finding a sense of purpose and value once they retire. Make every effort to find out what kinds of relationships and activities would help tenants to feel valued and appreciated.



How can we measure quality of life?

There are eight key areas of your assisted living programs that tenants will use to measure your success in creating an environment that focuses on quality of life:

Staff
Meals and Dining Arrangements
Management
Relationships
Facility Structure
Resident Rights
Living Needs
Assistance in Transition

Let's spend some time talking about what we would need to do in each of these areas to ensure quality service.

Instructor: Use the following notes as guidelines for sparking discussion of the eight key areas above.

Staff: What kind of qualities would staff members who deliver stellar customer service possess? Participants may identify reliability, clinical competence, and pleasant personalities as qualities that make a good

caregiver. Reinforce the importance of understanding that AL is built on the principles of autonomy, dignity and independence, and that good care giving embraces all of these principles.

Meals and Dining arrangements: What do you think people are looking for in a quality dining experience? (consider all elements of the experience, including the menu, food presentation, food delivery, etc.) Could the dining experience be impacted positively or negatively by the other people at the table? Consider how you would feel about being escorted to the dining room and seated at the table 45 minutes before a meal because it was convenient for staff.

Management: What qualities would a manager who is focused on outstanding customer service possess? (consider issues such as communication skills, availability, conflict resolution skills).

Relationships: How would your program go about helping tenants preserve old relationships and build new ones? Suggestions might include creating family friendly policies, holding family councils, and ensuring that tenants have opportunities to see the people that are important to them.

Facility Structure: What would good customer service look like in regard to the physical plant? (consider whether you have a formal structure to report complaints that all staff and tenants are aware of; do you measure the response time in correcting identified deficiencies? If you had a fire, would people know how to evacuate?)

Resident rights: How would an organization delivering stellar customer service communicate and uphold resident rights? (consider whether all applicants receive a copy of the resident rights, as required by Iowa law; do you have a formal complaint and appeals process, and do residents clearly understand how that process works?)

Living needs: If a resident needs toilet paper or paper towels, do we have systems in place to help them procure those items? How does the person who needs continence supplies procure them? What if a resident has no family in the area but needs to go shopping for clothes?

Assistance in transition: The first 30 days in assisted living is considered a critical adjustment period. What kinds of services and support could we provide during the transition phase that would make people feel good about their decision to live with us? (consider welcome baskets, assigning a tenant mentor, increased staff awareness of participation in activities, weekly meetings to talk about issues that arise, etc.)



How can we integrate customer service into our quality assurance program?

In order to build a customer-focused program, organizations must be willing to gather input from a variety of sources. You can't develop an effective quality assurance program without identifying issues that are important to your tenants. The following tools can be valuable in gathering both baseline and ongoing data to develop and refine your quality assurance plan.

Satisfaction Surveys

There is no better way to find out if customers are truly satisfied with your customer service than to simply ask them. Customer satisfaction surveys are the best way to measure customer satisfaction. Surveys should be anonymous and should be offered to both tenants and family members. Many times family members have a different perspective than tenants, and their input can be invaluable in your efforts to hone your customer service skills.

In addition to customer satisfaction surveys, organizations who are truly interested in raising the quality bar are wise to conduct employee satisfaction surveys. Satisfied, committed, loyal employees are the first and most important ingredient in any recipe to create a customer service culture. Employees should receive performance reviews at least annually, and they should be allowed to provide feedback regarding their supervisor's leadership skills.

Instructor: Ask participants if they have had the opportunity to provide feedback regarding a supervisor's leadership skills. If so, did they find it valuable, and were they able to remain constructive?

Tenant, Family, and Food Councils

Councils are an invaluable tool in creating a climate where feedback is both welcomed and encouraged. Giving tenants and family members the opportunity to participate in council meetings, where they can discuss important issues and air concerns in a respectful and constructive manner in public is a great way to showcase your program's interest in serving customers. Follow-up is critical. When issues are identified, responsibility for research and/or action should be assigned, and progress should be reported at the next meeting.

It will come as no surprise that the majority of complaints in assisted living often times center around the food. No matter how fantastic your cook is or how much money you spend on raw food, you simply can't please all the people all the time. Food councils are a great tool to help tenants see what you are "up against" when it comes to delivering a menu that suits everyone. One resident may speak up and say, "We have too much pasta," and the next resident will say, "I don't think we have enough pasta." It's a perfect opportunity to reinforce that you do

the very best you can to accommodate the tastes and preferences of all tenants. If you imagine eating at the same restaurant three times every day, you will begin to understand how tenants may grow discontent with the menu, even though you feel you are offering a good variety. Consider allowing them to recommend special meal ideas, such as Mexican or Chinese food or salad bars, pizza night, or maybe an occasional fast food lunch, where staff members take orders and run out to pick up lunch.

Tip: Holding a separate food council lets you focus on other issues during tenant council. Otherwise, the entire time allotment for tenant council will be consumed with food issues. Although tenant councils should be held every month, holding food councils every other month is usually acceptable to tenants.

Hold family councils at least twice a year. Offering snacks or a meal will increase attendance. Publish an agenda in advance so that tenants and family members can be collecting their thoughts. Allow a period of time at the end for new business, at which time families can bring specific issues to the table. Be prepared to provide a progress report in regard to issues that were raised at the previous family council meeting. Failure to follow-up on identified issues will undermine efforts to convince tenants and family members that your organization is committed to providing stellar customer service.

Complaint process: Create a suggestion box or some other formal method for tenants and family members to provide feedback on a regular basis. Keep a written record of complaints and follow-up until the complaint is resolved. Reviewing this written documentation from time to time can help to identify systemic issues that may need to be addressed through the program's quality assurance program.



What does a customer service culture look like?

In a customer service culture, you will find the following:

- **Staff who have an intimate knowledge of who the customer is and what brings them joy, fulfillment, comfort and satisfaction**
- **Committed, caring staff members with a high level of job satisfaction**
- **Management staff who understand the importance of effective conflict resolution and who are available to address issues as they arise**
- **A recognition that it costs six times more to attract a new customer than to keep an old one**

- **An evaluation system that includes teamwork and customer service as critical employee performance components**
- **An on-going education and training program**
- **Staff who are empowered to say “yes” to the customer whenever possible**
- **Approval to say “I don’t know” and connect the customer with someone who does**
- **A unified customer focus**
- **A quality plan that includes quality measures and plans for improvement**

Instructor: Ask participants to add their thoughts about what a good customer service culture looks like. Focus specifically on what kinds of staff behaviors focus on quality care. Reinforce the importance of respectful communication, including no “honey, dear, or sweetie” references, unless the tenant indicates they want to be called by these “pet” names. Tenants should be asked how they prefer to be addressed at the time of admission, and all staff should respect the tenant’s wishes. Talk about accountability to the team. Can you deliver good customer service if employees don’t report to duty?

Please take just a few moments to see if you can rank the reasons why clients leave assisted living, with 1 being the most frequent reason, and 6 being the least frequent. When you are finished, the instructor will provide you with the correct answers.

Why do customers leave assisted living?

Rank of Importance	Reasons They Leave
3	Friend's recommendation
4	Price
2	Move
1	Death
6	Perception of non-caring
5	Product dissatisfaction

Instructor: provide correct answers and allow a few minutes to discuss the rankings. The average stay in assisted living is 18 months. The most common reasons for leaving are death and move (most common move is to the nursing home, because the care needs have increased to the point where the tenant is no longer appropriate for AL). The good news is that product dissatisfaction falls fairly low in the rankings. However, a friend's recommendation ranks fairly high, so if a friend lives in a program delivering stellar customer service, it puts your program at greater risk of losing that tenant.

Summary:

Developing a stellar customer service culture in assisted living presents both unique challenges and incredible rewards. It's going to take some time and effort to get to know clients so well that you can predict what they want before they even know themselves. But what a great opportunity to serve those who are in need of our help.

When it comes to creating a customer service culture in assisted living, knowing the customer is the first step. Your program will want to design a strategy to get to better know the clients and then to design opportunities to exceed each tenant's expectations. In a nutshell, that's what a customer service culture is—getting to know the customers so well that you are delighting them every time they turn around.

You are at the center of your program's efforts to create that kind of culture. You have the power to positively influence your program's quality customer service efforts. Use your powers for good!!!

Now, let's take the test again (using the post-test column) and see if there are any areas of improvement.

Instructor: Have participants complete the post-test section of the test and talk briefly about areas where they improved. Thank participants for attending, and make sure everyone had a chance to sign-in on the attendance sheet.

Customer Service in Assisted Living

Question	Pre-test answer	Post-test answer
1. The typical customer in assisted living is:	a. 70-year old woman b. 70-year old man c. 85-year old woman d. 85-year old man	a. 70-year old woman b. 70-year old man c. 85-year old woman d. 85-year old man
2. The first step in creating a customer service culture is:	a. Get to know the customers b. Change job descriptions c. Treat every tenant the same d. Hold plenty of meetings	a. Get to know the customers b. Change job descriptions c. Treat every tenant the same d. Hold plenty of meetings
3. Some key concepts that determine tenant satisfaction include: (circle all that apply)	a. Safety, security and access b. Shopping, dining, and visiting c. Comfort and convenience d. Preserving dignity	a. Safety, security and access b. Shopping, dining, and visiting c. Comfort and convenience d. Preserving dignity
4. If we want to preserve the dignity of tenants, we need to focus on	a. Autonomy and privacy b. Individuality and Value c. Spiritual well-being d. All of the above	a. Autonomy and privacy b. Individuality and Value c. Spiritual well-being d. All of the above
5. Residents measure quality of life in these key areas: (circle all that apply)	a. Staff and management b. Furnishings in common areas c. Transportation d. Meals and dining services	a. Staff and management b. Furnishings in common areas c. Transportation d. Meals and dining services
6. The most effective tool for seeking formal feedback from all tenants is:	a. A complaint box b. Tenant surveys c. Tenant council d. Casual conversation	a. A complaint box b. Tenant surveys c. Tenant council d. Casual conversation
7. The number one reason clients leave an assisted living program is:	a. Death b. Move back home c. Move to a nursing home d. Move to another AL program	a. Death b. Move back home c. Move to a nursing home d. Move to another AL program
8. If you have an outstanding dining program, you can please all tenants.	True False	True False
9. It costs six times more to attract a new customer than to keep an old one.	True False	True False
10. The ultimate goal of providing outstanding customer service in any business or organization is to:	a. Comply with your QA plan b. Make yourself look good c. Delight you customers d. Increase your chance of getting a raise	a. Comply with your QA plan b. Make yourself look good c. Delight you customers d. Increase your chance of getting a raise
TOTAL		

Answer key
Pre- and Post-Test

1. c.
2. a.
3. a., c., d.
4. d.
5. a. d.
6. b.
7. a.
8. False
9. True
10. c.